

Job Aid: How to Score and Award a Bid

This Job Aid shows how to:

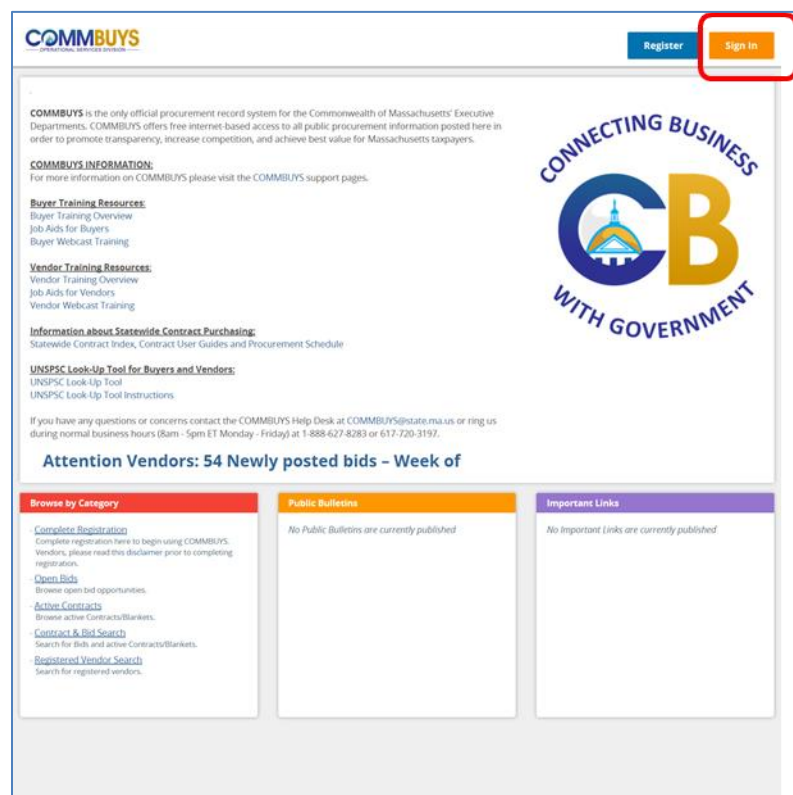
- How to score and award a bid using the bid tabulation function.

Of Special Note:

The bid tabulation function in COMMBUYS is used to score and review vendor responses to bids (called **quotes** in the system). The entire process - bids, quotes, scoring guidelines, etc. - is viewable in COMMBUYS, which offers users the benefit of concise document management as well as an organized electronic procurement file. Use of this bid tabulation function is optional. If bid tabulation is not used to score a bid, this information can be entered on a spreadsheet (or as follows current practice) and posted as an attachment on the Attachments tab.

The Scorecard is an assessment tool used to evaluate quotes in COMMBUYS. Scoring criteria is based on a weighting system of a total of 10. Each criterion will have a value (or "weight") assigned as a percent. The total of all criteria combined must equal 100. The scores against those weights are recorded numerically from 1 to 99. After criteria are entered, the purchaser forwards a request to a group of approvers who use the criteria to evaluate (score) the bid.

Screenshot



Directions

Step 1: Log-in to COMMBUYS

1. Launch the COMMBUYS website by entering the URL (<https://www.commbuys.com>) in the browser or by clicking the hyperlink [COMMBUYS](https://www.commbuys.com).
2. Click on the orange **Sign In** button in the upper right hand corner.

Job Aid:

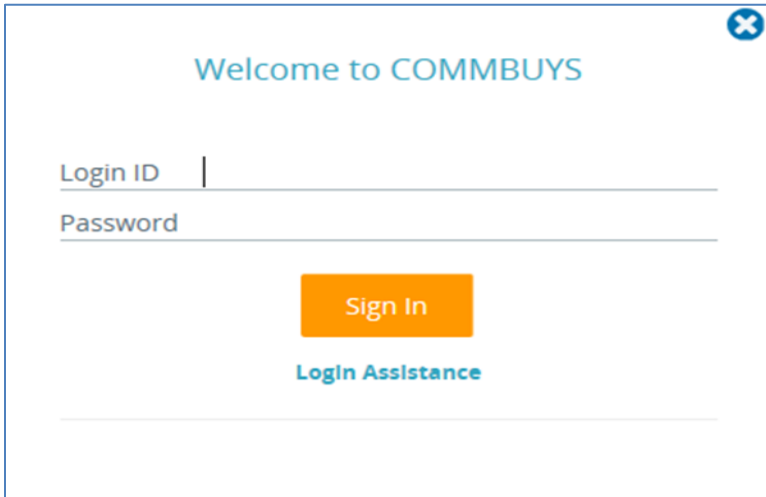
How to Score and Award a Bid

Screenshot

Directions

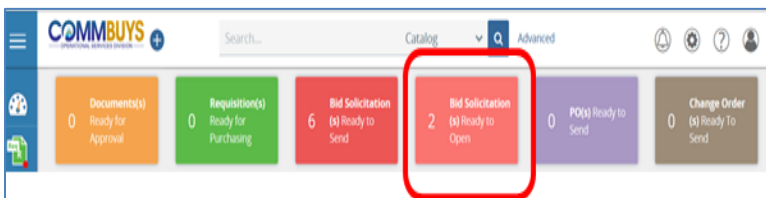
Step 2: Logging In

1. Enter your **Login ID** and **Password**.
2. Click on the **Sign In** button.



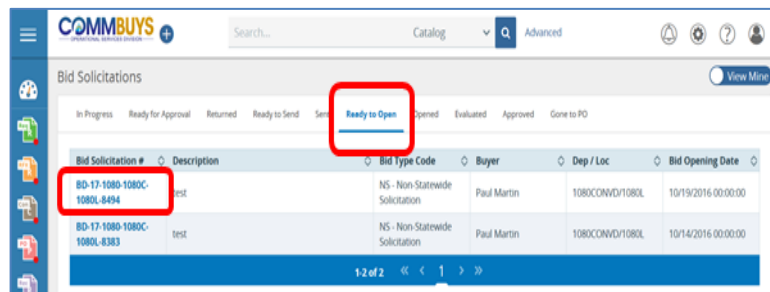
Step 3: Opening Ready to Open Bid Solicitations

From the Main Menu, click on the **Bid Solicitation(s) Ready to Open** box.



Step 4: Selecting the Bid

1. The Bid Solicitations screen displays. Click on the **Ready to Open** tab.
2. Click on the blue hyperlink of the desired bid in the **Bid Solicitation #** column.



Bid Solicitation #	Description	Bid Type Code	Buyer	Dep / Loc	Bid Opening Date
BD-17-1080-1080C-1080L-8494	test	NS - Non Statewide Solicitation	Paul Martin	1080CONVD1080L	10/19/2016 00:00:00
BD-17-1080-1080C-1080L-8383	test	NS - Non Statewide Solicitation	Paul Martin	1080CONVD1080L	10/14/2016 00:00:00

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Screenshot

Directions

There is no item accounting available for this item.

Pre-Bid Approval Path:

Approval Path

Delete	Order Sequence	Approver	Alternate Approver	Level	Date Requested	Date	Action	Comments
	1	Paul Martin		1	09/30/2016 01:50 PM	09/30/2016 01:50 PM	Approved (Paul Martin)	

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Step 5: Opening the Bid

The Bid opens to the Summary tab. Scroll to the bottom of the page and click on the **Open Bid** button.

Pre-Bid Approval Path:

Approval Path

Delete	Order Sequence	Approver	Alternate Approver	Level	Date Requested	Date	Action	Comments
	1	Paul Martin		1	09/30/2016 01:50 PM	09/30/2016 01:50 PM	Approved (Paul Martin)	

Step 6: Opening the Bid Tab

When the Summary screen redisplay, scroll to the bottom and click on the **Bid Tab** button.

Bid Tabulation for Bid #BD-17-1080-OSD06-OSD06-8683

Total Number of Submitted Quotes: 2

Consider All	Quote #	Description	Vendor ID	Vendor Name	Submit Date	Attachments
<input checked="" type="checkbox"/>	QT-1080-OSD06-OSD06-15858	text	00023012	Kramerica	11/08/2016 12:38:39 PM	No attachments
<input checked="" type="checkbox"/>	QT-1080-OSD06-OSD06-15859	text	00023013	Kramerica	11/08/2016 01:02:45 PM	No attachments

Step 7: Identifying SBPP Vendors

The **Bid Tabulation** page opens displaying the list of all quotes submitted by registered COMMBUYS vendors for the selected bid.

If your procurement is a small procurement, (\$150,000 or less), you must identify SBPP-active vendors. If your procurement is over \$150,000, skip to step 8.

In order to identify whether vendors submitting quotes are SBPP-active, follow these steps.

Vendor Profile - Kramerica

Programs

Program Details

Program: SBR	Program Status: Active
Renewal Date: 09/15/2017	
Acknowledged program conditions?: Acknowledged	Date Acknowledged/Disagreed: 09/15/2016
User Last Updated: Cosmo Kramer	Date Last Updated: 09/15/2016

1. Click on a blue hyperlink in the **Vendor ID** column, which brings up that Vendor's profile in a separate window.
2. Click on the **Program** tab and see if the Vendor has the code SBR (Small Business Registered) and **Active status**.
3. Make a list of all SBR-Active vendors who have submitted quotes.

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Screenshot

Directions

Step 8. Completing the Score Tab

1. To begin the scoring and evaluation process, click on the **Score** tab. The Score tab consists of three sub-tabs:

- **Maintain** – used to enter and display the criteria, criteria weights, and select scorers
- **Score Entry** – used to enter and display individual vendor scores based on vendor quotes
- **Score Summary** – displays a side-by-side view of all entered vendor scores

2. Enter a scoring criterion name in the **Scoring Component Description** field.

3. Enter a scoring weight percentage in the **Weight** field.

4. Click on the dropdown arrow next to the **Scorer Name** field and select a scorer.

5. Check the boxes that are applicable for your Bid evaluation:

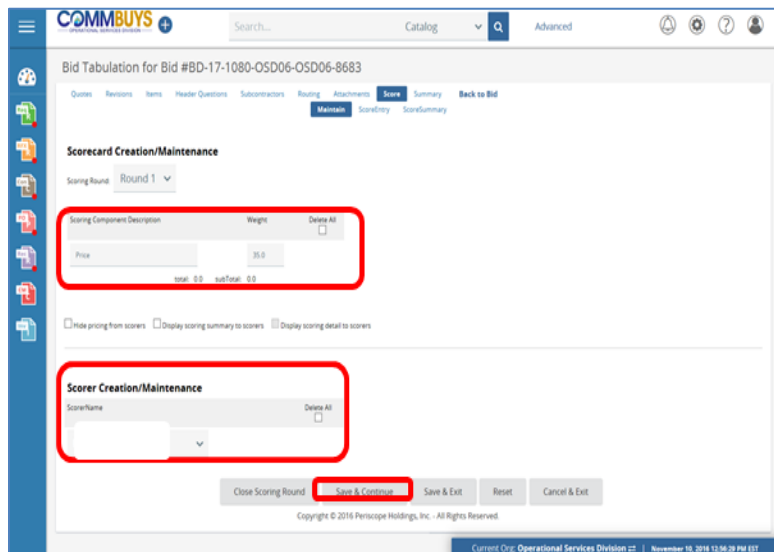
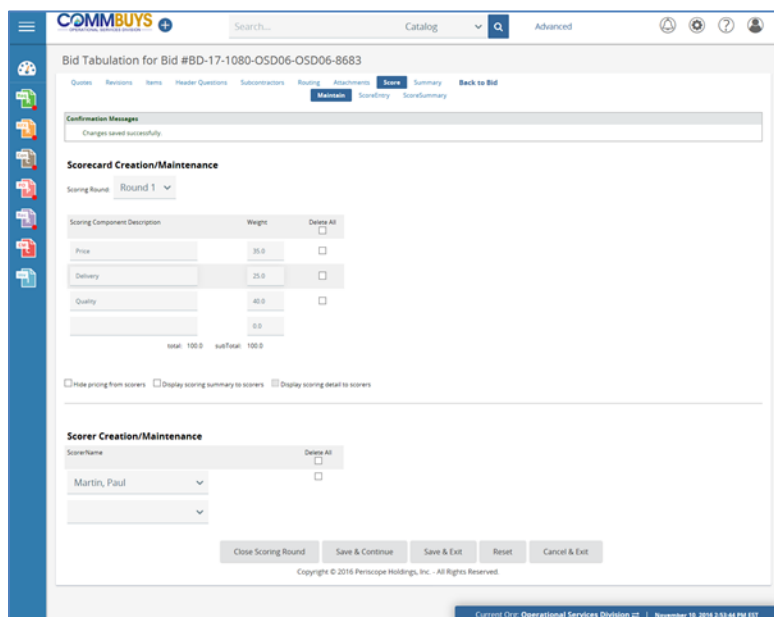
☐ Hide pricing from scorers

☐ Display scoring summary to scorers

☐ Display Scoring Detail to scorers

6. Click on the **Save & Continue** button.

NOTE: If you enter a weight less than 100, the screen will redisplay with a red error message indicating that the weights do not add up to 100. Continue adding criteria until the weight totals 100. Likewise, you will receive a red error message if you fail to select a scorer.

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Screenshot

Directions

Step 9: Opening a Quote

1. Click on the **Quotes** tab to review the bids prior to Score Entry.
2. Click on a blue hyperlink in the **Quote #** to open a vendor quote.

Step 10: Reviewing a Quote

The quote opens in a new pop-up window to the **Summary** tab. All vendor quote information is stored in the displayed tabs.

1. Review all information in all tabs (including any submitted attachments) to evaluate the vendor quote.
2. Click on the **Close Window** button.
3. Repeat Steps 9 and 10 for each vendor quote.

Bid Tabulation for Bid #BD-17-1080-OSD06-OSD06-8683

Quotes Revisions Items Header Questions Subcontractors Routing Attachments Score Summary Back to Bid

Total Number of Submitted Quotes: 2

Consider All	Quote #	Description	Vendor ID	Vendor Name	Submit Date	Attachments
<input type="checkbox"/>	QT-1080-OSD06-OSD06-15858	test	00020012	Kramerica	11/09/2016 12:38:39 PM	No attachments
<input checked="" type="checkbox"/>	QT-1080-OSD06-OSD06-15859	test	00020013	Bane	11/09/2016 01:02:45 PM	No attachments

Create New Quote Save And Continue

Quote QT-1080-OSD06-OSD06-15858 - Kramerica

General Items Questions Subcontractors Terms & Conditions Attachments Evaluations Preference Reminders Summary

Header Information

Quote #:	QT-1080-OSD06-OSD06-15858	Bid #:	BD-17-1080-OSD06-OSD06-8683	Status:	Submitted
Organization:	Operational Services Division	Delivery Days:	5	Discount Percent:	5.0
Description:	test	Alternate Bid:	No	Shipping Terms:	
Bid Flag:	Yes	Ship Via Terms:		Payment Term:	
Freight Terms:		Info Contact:		Quote Total:	\$95.00
Promised Date:		User Last Updated:	Cosmo Kramer	User Created:	Cosmo Kramer
Comment:	Vendor accepts the terms & conditions with no exceptions.				

Attachments

Agency Files:
Agency Forms:
Vendor Files:
Vendor Forms:

Item Information

Print Sequence # 1.0 : (90-15 - 15) test

Quantity	UOM	Unit Cost	Discount %	Tax Rate	Freight	Extended Amount	No Bid	No Charge
1.0	EA	\$100.00	5.0%	0.0%	\$0.00	\$95.00	No	No

Print Close Window

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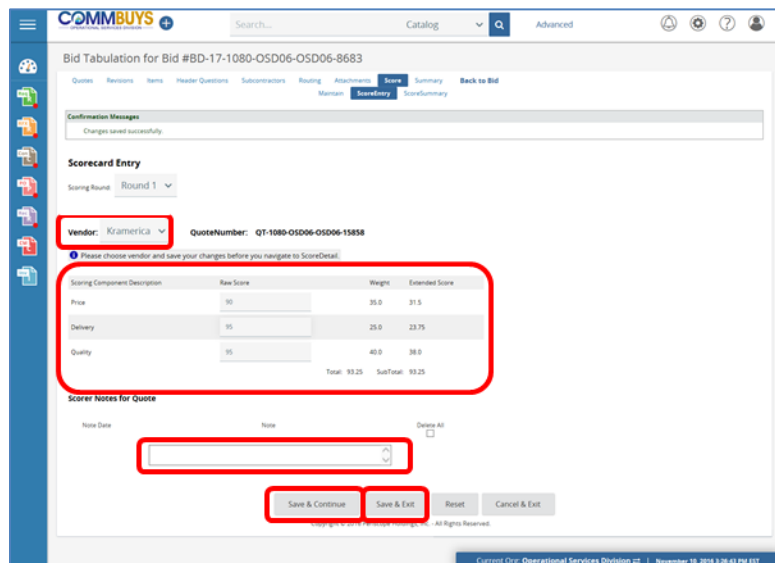
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Screenshot

Directions

Step 11. Entering Scores

1. Click on the **Score** tab.
2. Click on the **Score Entry** sub-tab.
3. Click on the dropdown arrow next to the **Vendor** field and select a vendor.
4. Enter a score in the **Raw Score** field for each criterion. COMMBUYS will automatically multiply the raw score times the weight and provide an **Extended Score**.
5. If desired, enter notes in the **Note** field.
6. Click on the **Save & Continue** button.
7. Choose the next vendor from the vendor dropdown menu and repeat the process until all vendor quotes have been scored.



COMMBUYS Bid Tabulation for Bid #BD-17-1080-OSD06-OSD06-8683

Quotes Revisions Items Header Questions Subcontractors Routing Attachments **Score** Summary Back to Bid

Confirmation Message: Changes saved successfully

Scorecard Entry

Scoring Round: Round 1

Vendor: Kramerica QuoteNumber: QT-1080-OSD06-OSD06-15858

Please choose vendor and save your changes before you navigate to ScoreDetail.

Scoring Component Description	Raw Score	Weight	Extended Score
Price	30	35.0	31.5
Delivery	95	25.0	23.75
Quality	95	40.0	38.0
Total	93.25	SubTotal:	93.25

Scorer Notes for Quote

Note Date Note Delete All

Save & Continue Save & Exit Reset Cancel & Exit

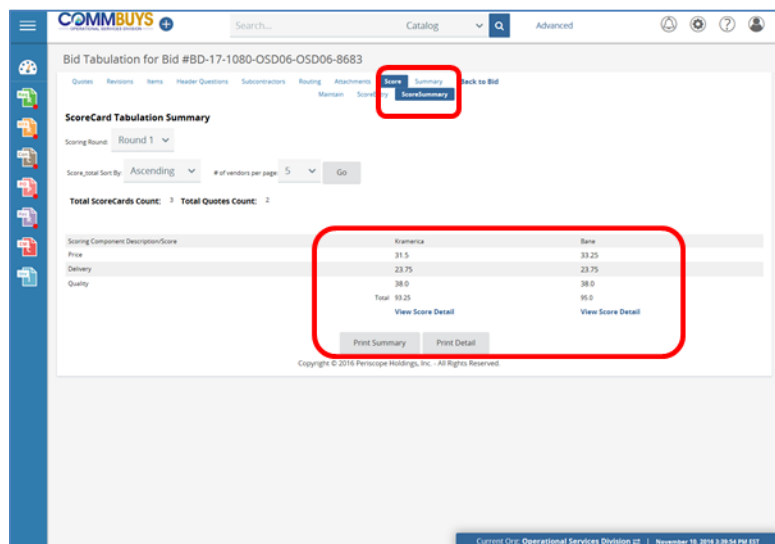
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Current Org: Operational Services Division 27 November 10, 2016 3:30:43 PM EST

Step 12: Viewing the Scores

1. Click on the **Score Summary** sub-tab.
2. The **Score Summary** tab displays the weighted scores side by side for easy review.

Hyperlinks to **View Score Detail** are available for each vendor and buttons are available to **Print Summary** or **Print Detail**.



COMMBUYS Bid Tabulation for Bid #BD-17-1080-OSD06-OSD06-8683

Quotes Revisions Items Header Questions Subcontractors Routing Attachments **Score** Summary Back to Bid

ScoreCard Tabulation Summary

Scoring Round: Round 1

Score, total Sort By: Ascending # of vendors per page: 5 Go

Total ScoreCards Count: 3 Total Quotes Count: 2

Scoring Component Description	Vendor	Raw Score	Weight	Extended Score
Price	Kramerica	31.5	35.0	31.5
Delivery	Kramerica	23.75	25.0	23.75
Quality	Kramerica	38.0	40.0	38.0
Total	Kramerica	93.25		93.25

View Score Detail View Score Detail

Print Summary Print Detail

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Current Org: Operational Services Division 27 November 10, 2016 3:30:54 PM EST

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Screenshot

Directions

Step 13. Selecting Vendors for Award

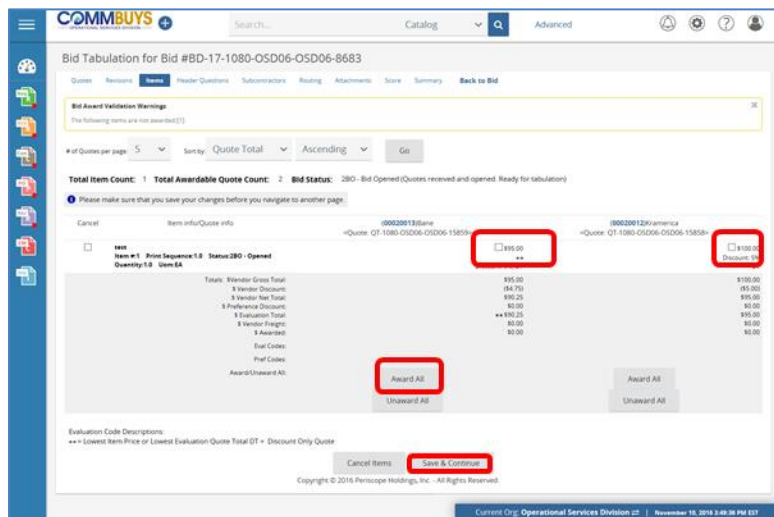
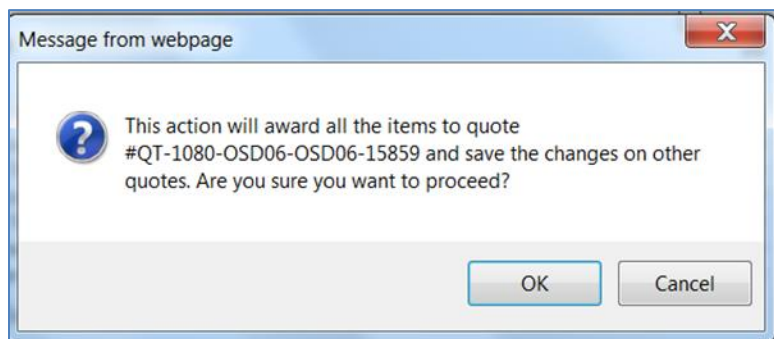
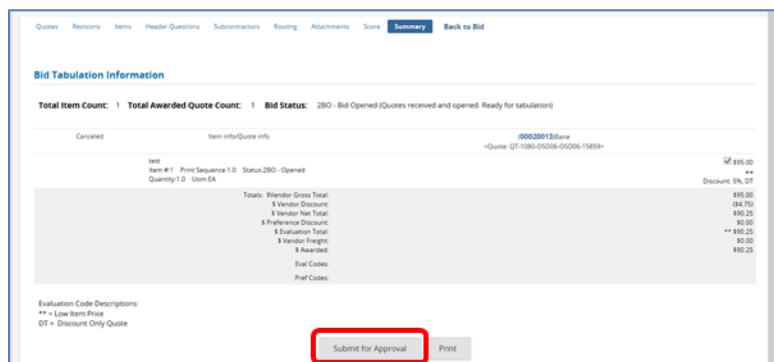
1. Click the **Items** tab to view and make the award.
2. To award all lines of the bid to a single vendor, click on the **Award All** button in the correct Vendor's column. To award a multi-line bid to different vendors, click on the **checkbox** on each line under the vendor who will receive the award.
3. After the award decisions are complete, click on the **Save & Continue** button.

NOTE: If you choose **Award All**, a popup message will appear asking if you are sure you want to proceed. If so, click on the **OK** button.

NOTE: For small procurements (those less than or equal to \$150,000) refer to the SBPP Policy.

Step 14. Awarding the Bid

1. Click on the **Summary** tab to view the awarded vendor(s).
2. Click on the **Submit for Approval** button.

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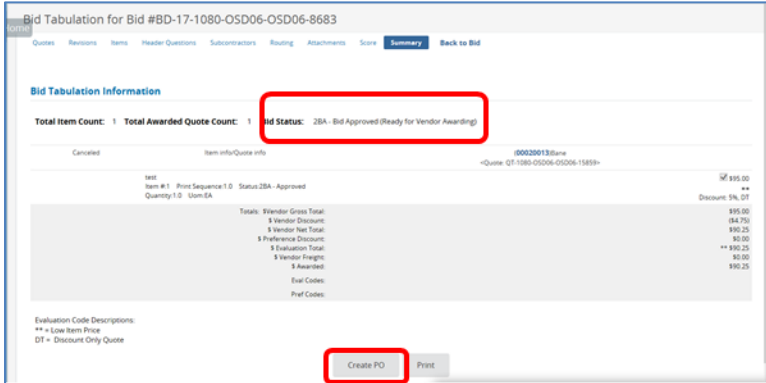
Screenshot

Directions

Step 15: Creating a PO

Once the evaluated bid has been approved, it will be in **2BA – Bid Approved** status.

Go to the Summary screen of the Bid Tabulation and click on the **Create PO** button at the bottom of the page.



Bid Tabulation for Bid #BD-17-1080-OSD06-OSD06-8683

Quotes Revisions Items Header Questions Subcontractors Routing Attachments Score **Summary** Back to Bid

Bid Tabulation Information

Total Item Count: 1 Total Awarded Quote Count: 1 **Bid Status: 2BA - Bid Approved (Ready for Vendor Awarding)**

Cancelled	Item Info/Quote Info	00020013/Line	
1001	Item #1 Print Sequence 1.0 Status 2BA - Approved Quantity 1.0 Item 5A		\$15.00
			**
			Discount 1% 01
			\$15.00
			(\$4.75)
			\$10.25
			\$0.00
			** \$10.25
			\$0.00
			\$10.25

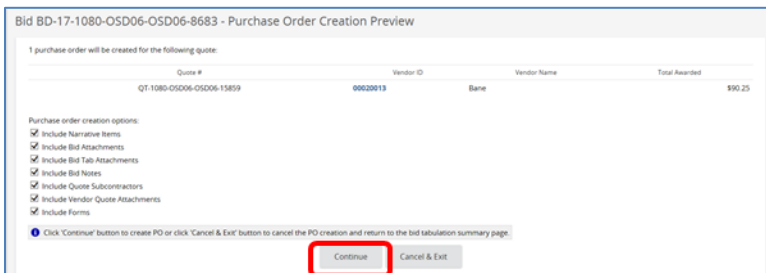
Evaluation Code Descriptions:
 ** = Low Item Price
 01 = Discount Only Quote

Create PO Print

Step 16: Generating an MBPO

The PO Creation Preview page displays. Any of the pre-checked boxes can be deselected; however that information will then need to be filled in manually.

Click on the **Continue** button to generate a Master Blanket Purchase Order (MBPO) from all the information listed in the Bid and Bid Tabulation tabs screens.



Bid BD-17-1080-OSD06-OSD06-8683 - Purchase Order Creation Preview

1 purchase order will be created for the following quote:

Quote #	Vendor ID	Vendor Name	Total Awarded
QT-1080-OSD06-OSD06-15859	00020013	Bane	\$10.25

Purchase order creation options:

- ☒ Include Narrative Items
- ☒ Include Bid Attachments
- ☒ Include Bid Tab Attachments
- ☒ Include Bid Notes
- ☒ Include Quote Subcontractors
- ☒ Include Vendor Quote Attachments
- ☒ Include Forms

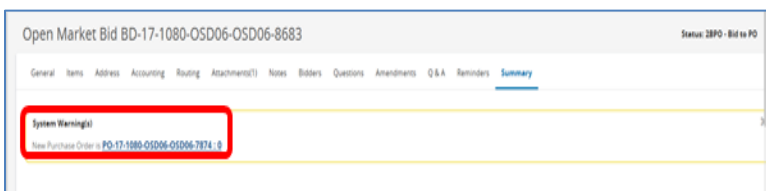
Click "Continue" button to create PO or click "Cancel & Exit" button to cancel the PO creation and return to the bid tabulation summary page.

Continue Cancel & Exit

Step 17: Opening the PO

The Bid Summary tab screen displays with the new PO number. To open and edit and/or submit the MBPO, click on the blue hyperlink **PO #**.

NOTE: The PO is created and will be marked *In-Progress* if you wish to return to COMMBUYS at a later date.



Open Market Bid BD-17-1080-OSD06-OSD06-8683 Status: 2BPO - Bid to PO

General Items Address Accounting Routing Attachments(?) Notes Bidders Questions Amendments Q & A Reminders **Summary**

System Warning(s)

New Purchase Order = PO-17-1080-OSD06-OSD06-7874-0

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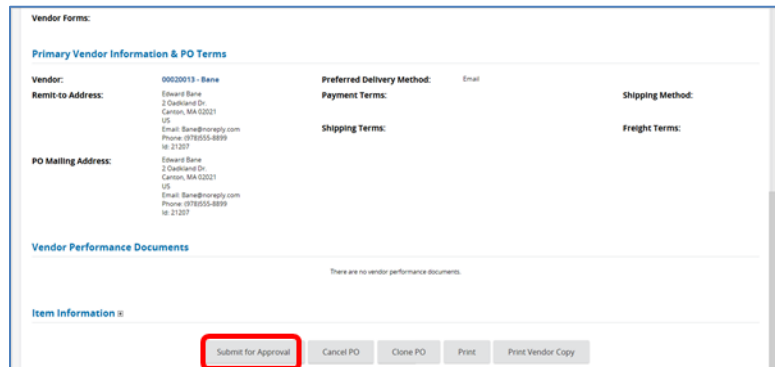
Screenshot

Directions

Step 18: Submitting the MBPO for Approval

The PO will open to the **Summary** tab. It is In-Progress and therefore edits can be made if required.

Click on the **Submit for Approval** button once you are ready to finalize the MBPO.



The screenshot shows the 'Vendor Forms' section with the following details:

- Primary Vendor Information & PO Terms**
 - Vendor:** 00620013 - Bane
 - Remit-to Address:** Edward Bane, 2 Oakland St., Canton, MA 02021, US, Email: Bane@monopoly.com, Phone: (978)555-8899, 10/21/2017
 - Preferred Delivery Method:** Email
 - Payment Terms:**
 - Shipping Method:**
 - Shipping Terms:**
 - Freight Terms:**
 - PO Mailing Address:** Edward Bane, 2 Oakland St., Canton, MA 02021, US, Email: Bane@monopoly.com, Phone: (978)555-8899, 10/21/2017
- Vendor Performance Documents**

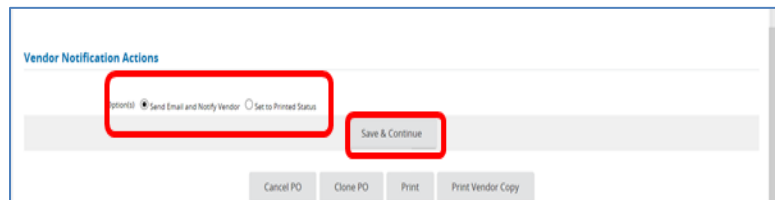
There are no vendor performance documents.
- Item Information**

Buttons: **Submit for Approval** (highlighted), Cancel PO, Clone PO, Print, Print Vendor Copy

Step 19: Finalizing the MBPO

Once the MBPO has gone through the appropriate approval path it is in a **Ready to Send** status.

- The PO will open to the **Summary Tab**. At the bottom of the page, select from one of the two options:
 - Send Email and Notify Vendor**
 - Set to Printed Status** (still posts the purchase order on COMMBUYS but does not send any vendor emails)
- Click on the **Save and Continue** button to finalize the MBPO and place the order. The status changes to **Sent**.



The screenshot shows the 'Vendor Notification Actions' section with the following details:

- Vendor Notification Actions**
 - 00620013**
 - ☒ Send Email and Notify Vendor
 - ☐ Set to Printed Status
 - Save & Continue** (highlighted)
- Buttons: Cancel PO, Clone PO, Print, Print Vendor Copy